

National Early Childhood Pulse Survey

State of Early Childhood Education – April 2020



April 28, 2020

INVESTMENT BANKING + STRATEGY CONSULTING

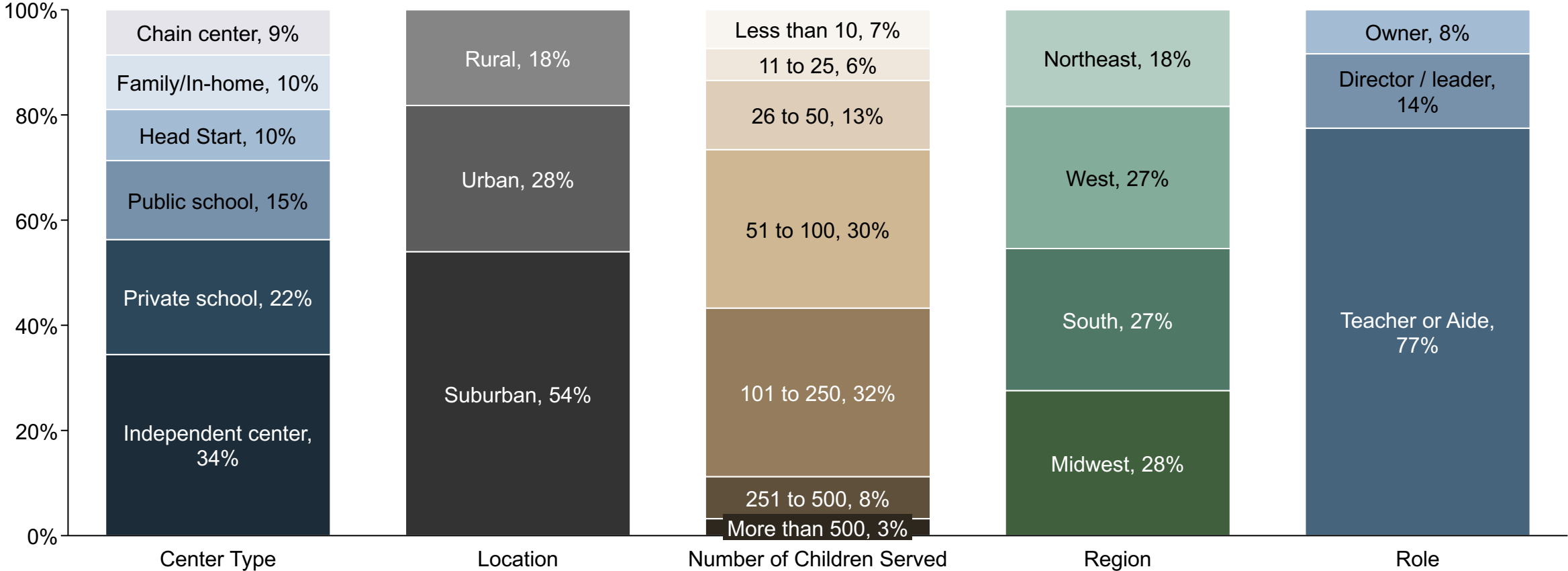
About the survey

- Tyton Partners ran a nationwide online survey targeting Early Childhood Education (ECE) teachers and leaders from April 22-24, 2020 in order to better understand the wide-scale disruption resulting from COVID-19
- Survey questions focused on several issues including, but not limited to:
 - Status of current services, including live and remote activities
 - Strategies leveraged to engage with children and support families
 - Key challenges in teaching/ learning and business operations
 - Effectiveness and sustainability of current practices
- Respondents included 465 early childhood teachers and center directors, distributed across various center types
- Geographic distribution was roughly representative across states and location types (i.e., urban, suburban and rural)
- Tyton Partners has donated to the CDC Foundation's Emergency Response Fund for Coronavirus in appreciation of all our respondents' time (give.cdcfoundation.org)

For questions about the data or an opportunity to continue the conversation, please contact Managing Partner Adam Newman at anewman@tytonpartners.com

Survey demographics overview

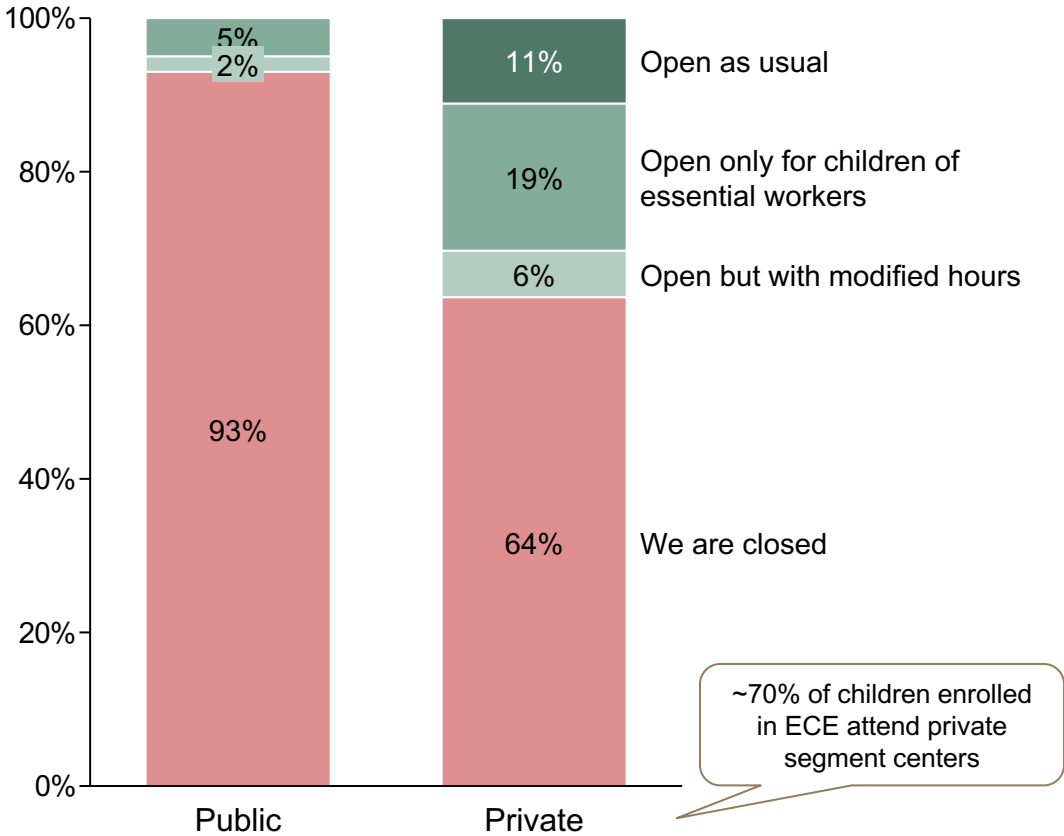
Survey Demographics



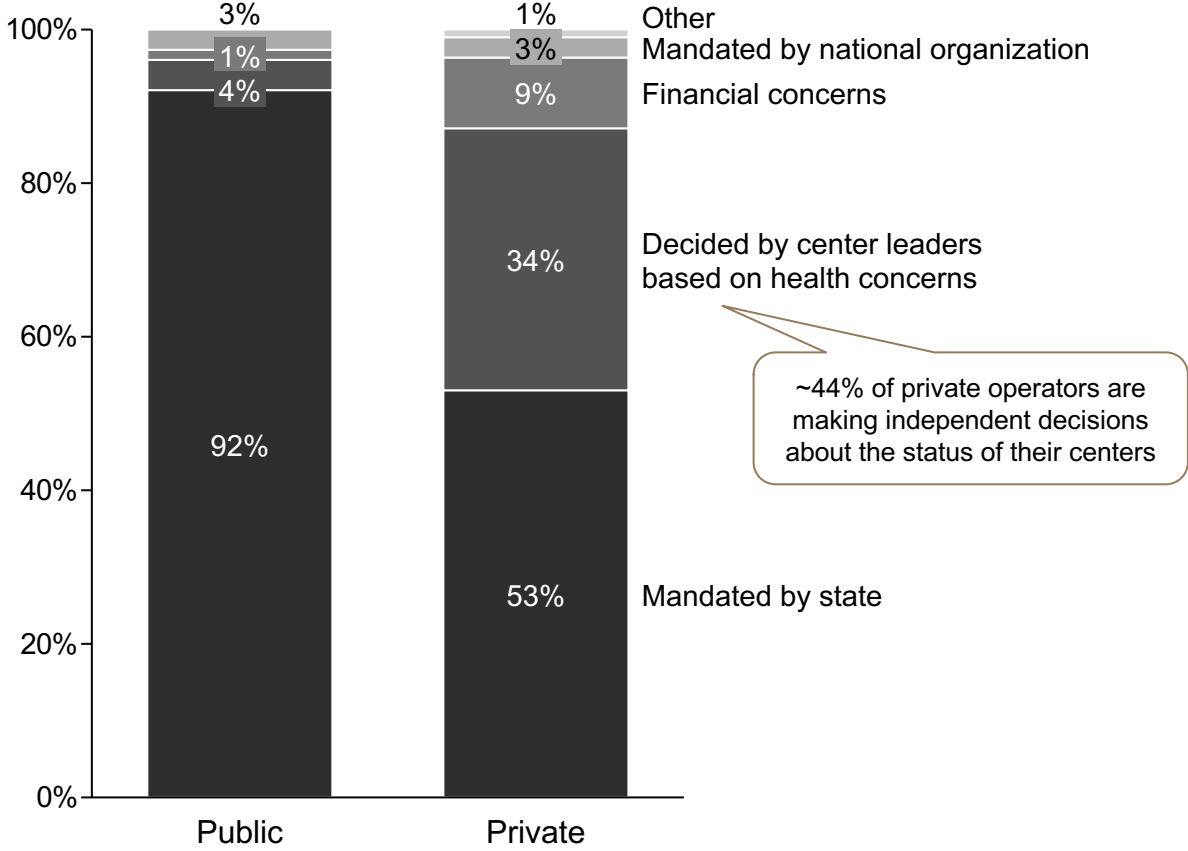
***Chain center” refers to providers with >5 centers regionally or nationally; **Survey population is generally reflective of U.S. enrollment across various center types; for example, 30% of children enrolled in Pre-K in the U.S. are in Head Start / Early Head Start or Public Schools, whereas in this survey 25% of respondents represent these public programs*
Notes: 517 total respondents; Teachers include teacher’s aid (2% of respondents); 99% indicated they have responsibility and/or visibility into teaching, and 42% indicated they have responsibility and/or visibility into business operations
 Sources: Tyton Partners COVID-19 Early Childhood Education Survey, April 2020

While nearly all public early childhood programs are closed, more than a third of private centers remain open, providing services to children and families

Status of center as a result of COVID-19, by type of ECE organization*



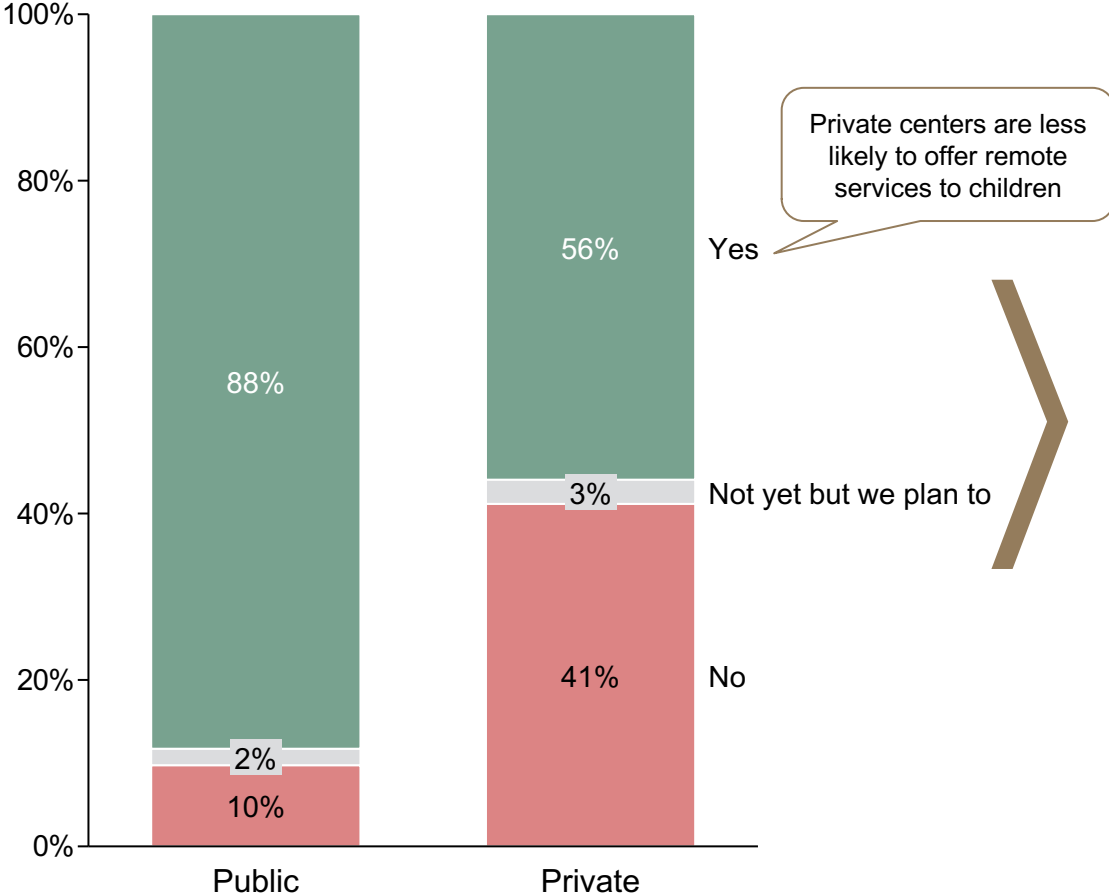
Reason for closing by type of ECE organization



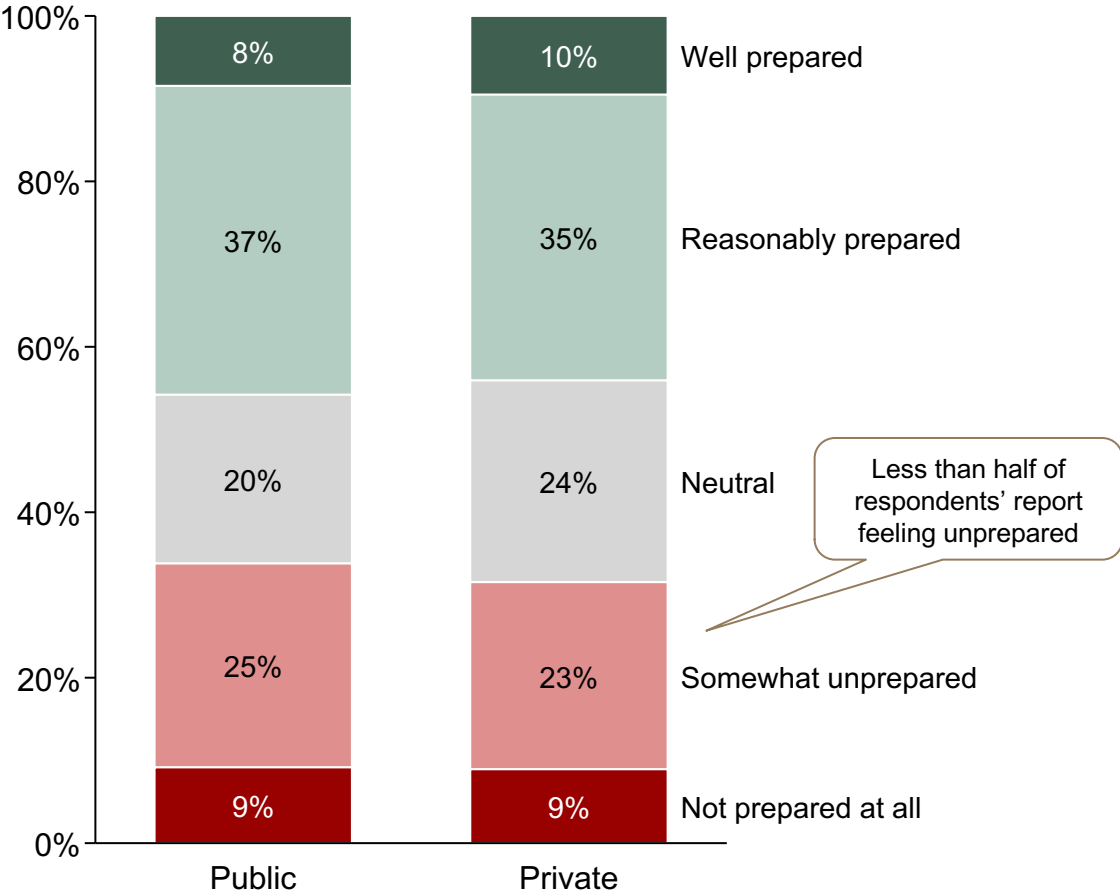
Notes: *"Public" refers to PreK public school and Head Start / Early Head Start centers, n=100; "Private" refers to independent and chain centers, private schools, and family/ in-home programs, n=327; Questions: "Please indicate the status of your center as a result of COVID-19;" n=427; "Why is your center currently closed or planning to close?;" n=276 Sources: NIEER; NCES; Tyton Partners COVID-19 Early Childhood Educator Survey April 2020

~90% of public schools report engaging remotely with children; across public and private segments respondents feel equally prepared to tackle remote learning

Remote learning status, by type of ECE organization



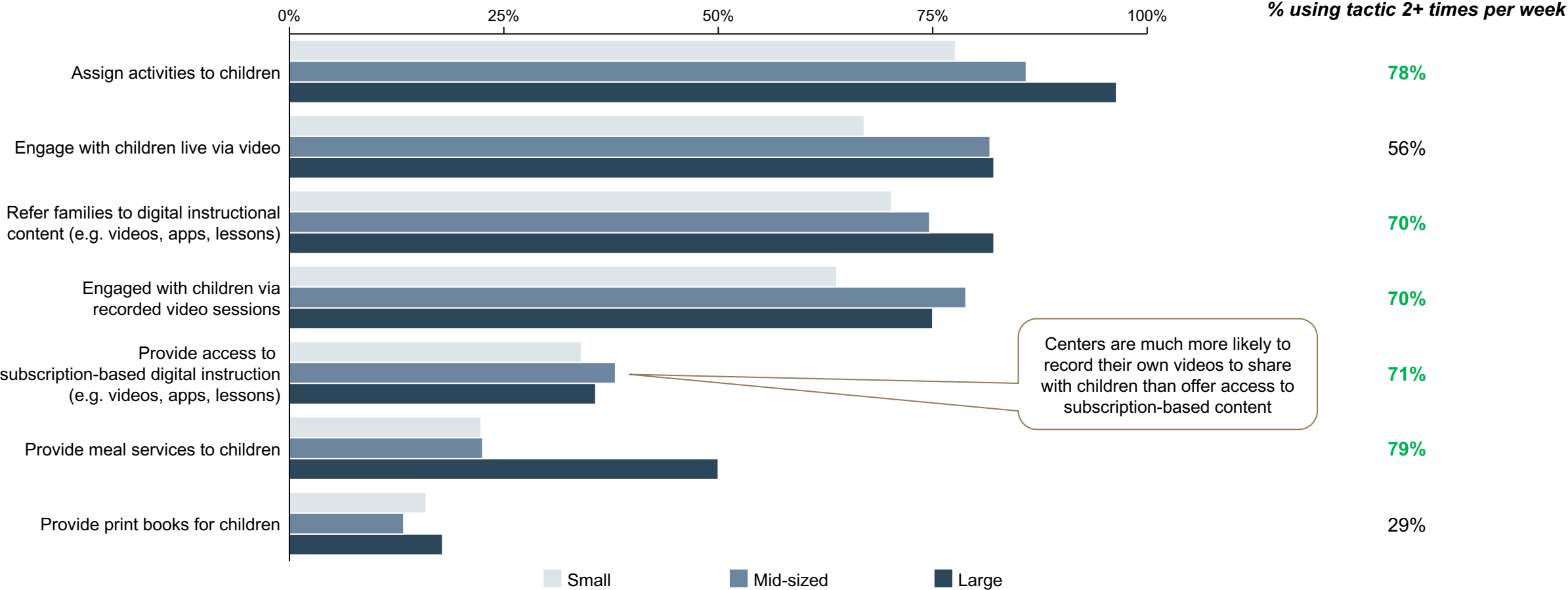
Self-described remote learning preparedness, by type of ECE organization



Note: Questions: "Is your center currently engaging children remotely?;" n=248; "To what extent do you feel prepared to teach and/or support children remotely?" n=148
 Sources: Tyton Partners COVID-19 Early Childhood Educator Survey April 2020

All centers are fairly engaged with their children, with larger ones generally most active; frequency of interactions is also high

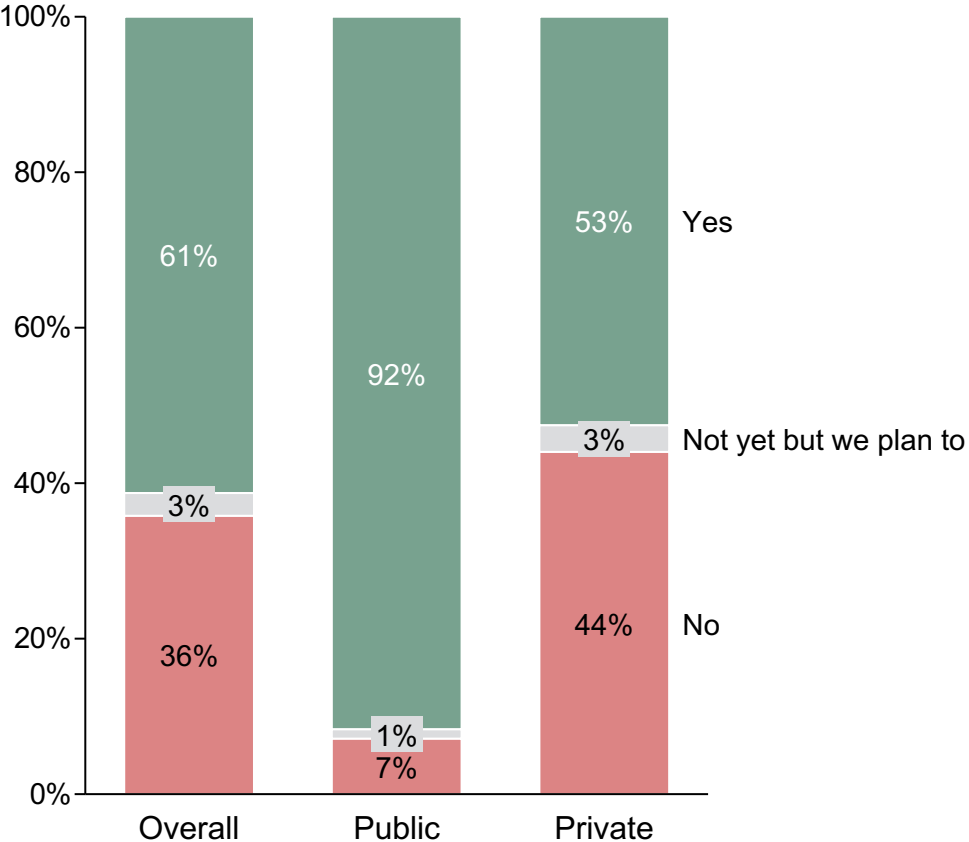
Most common activities to engage children, by size of ECE center



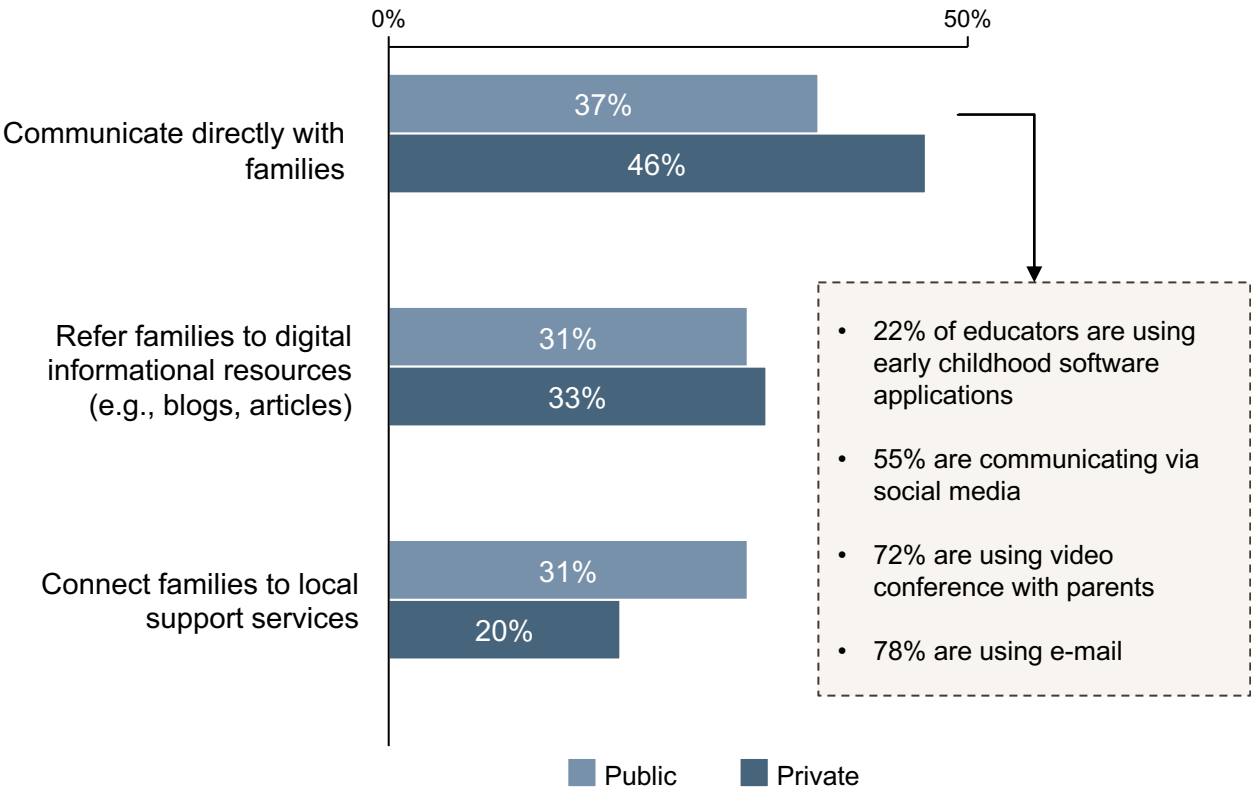
Note: Small centers serve <50 students; Medium centers serve 50-250 students; Large centers serve >250 students; Questions: "What activities is your center using to engage children? Please select all that apply;" n=278; "How often do you engage in these activities?;" n=278; "How many total children does your center serve?;" n=476
Sources: Tyton Partners COVID-19 Early Childhood Educator Survey April 2020

Majority of respondents' support children and families; both public and private centers communicate regularly and connect families with relevant local services

Centers supporting families remotely, by type of ECE organization



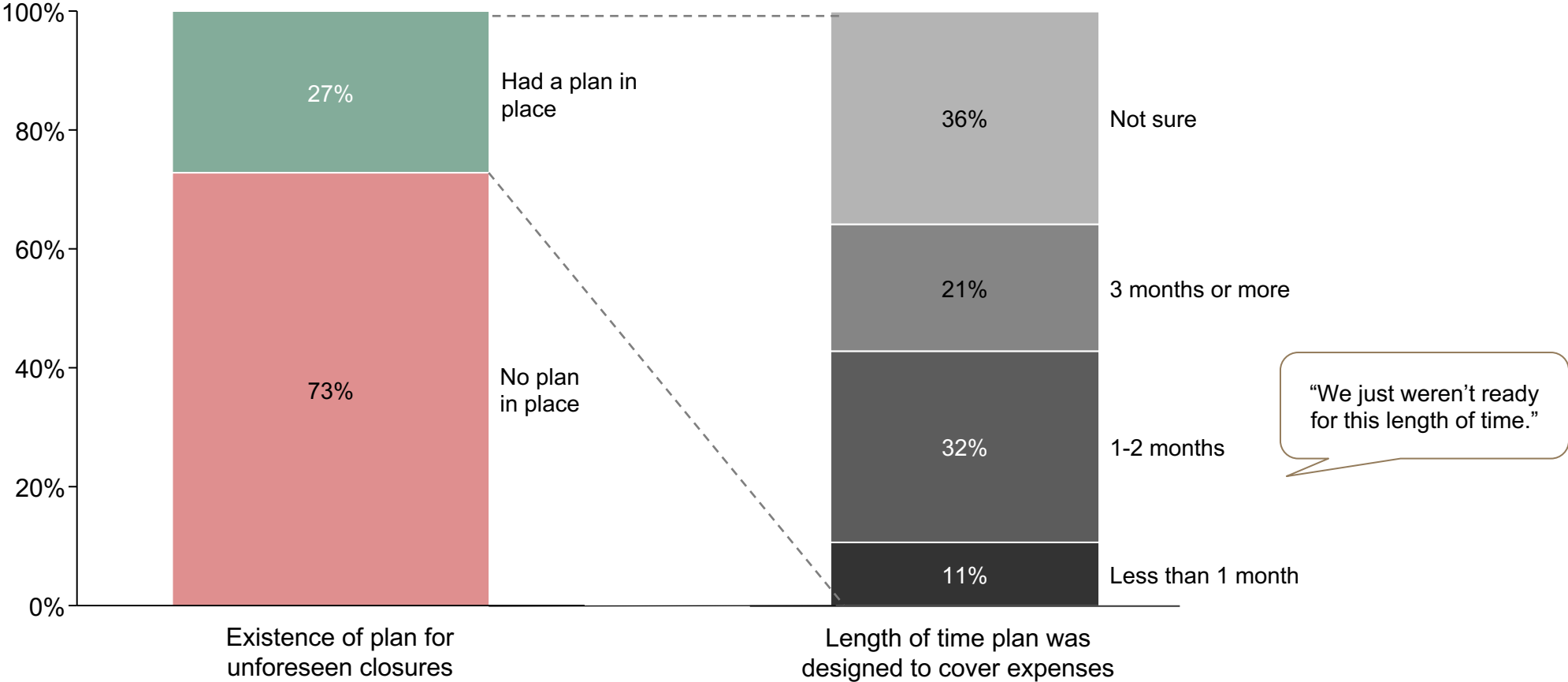
Top family support activities, by type of ECE organization



Note: Questions: "Is your center currently supporting families remotely?" n=393; "What activities is your center using to support families? Please select all that apply;" n=221; "What channels is your center using to communicate directly with families?;" n=194
 Sources: Tyton Partners COVID-19 Early Childhood Educator Survey April 2020

More than 25% of closed centers had contingency plans for an unforeseen disruption, but most did not anticipate a long-term need scenario

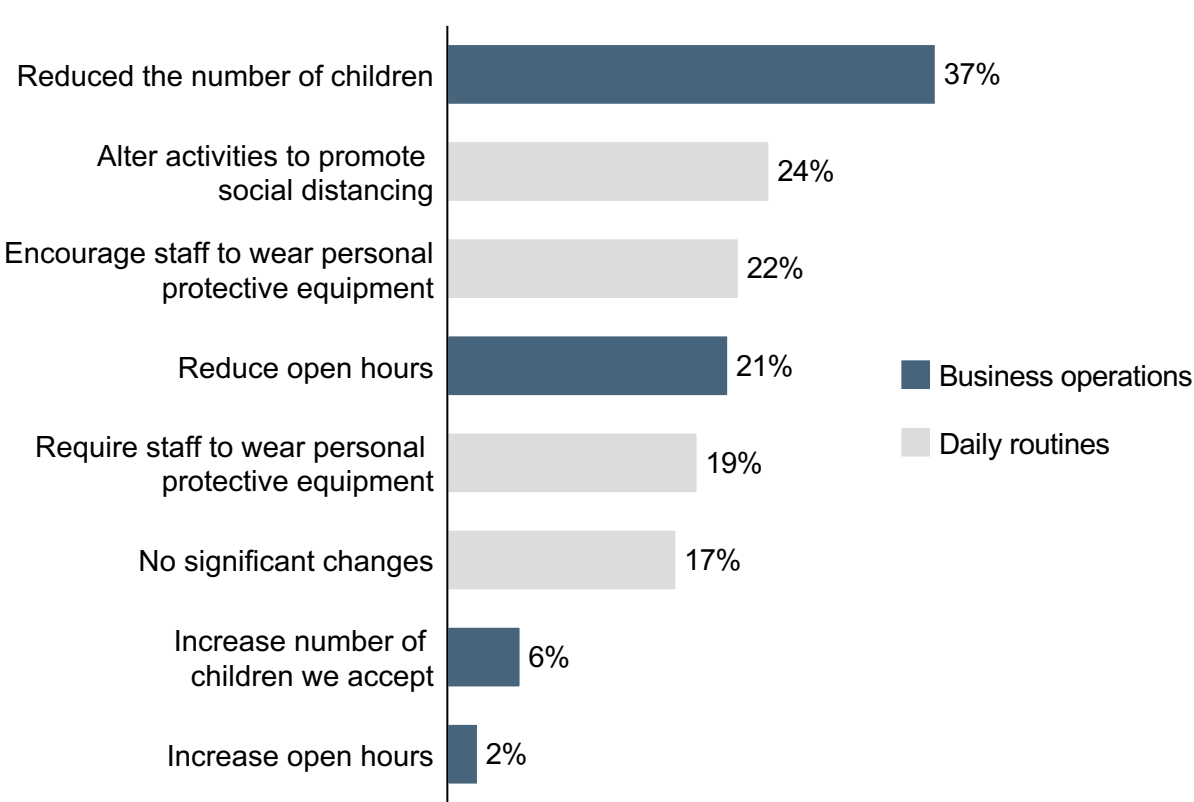
Readiness of centers for an unexpected disruption



Note: Data reflects respondents who have responsibility or visibility into the business functions of their centers; Questions: "Did your center have a plan in place for unforeseen closure?;" n=125; "How long was your center's plan meant to support its expenses?" Sources: Tyton Partners COVID-19 Early Childhood Educator Survey April 2020

Currently open centers are making major adjustments to meet the needs of their constituents

Modifications made by centers remaining open



Select quotes by center decision-makers

“I restricted parent visits into the center and also altered age range, so we **now accept school-age children.**”

“**I furloughed most of our employees** and then shifted around the hours of a few I have decided to keep on.”

“We have had to **combine classrooms** and **cut teacher hours.**”

“I end up staying **an extra hour or two sanitizing** every toy and nook and cranny in my room daily.”

“We **check fevers** and wash hands every day upon arrival – for both staff and kids.”

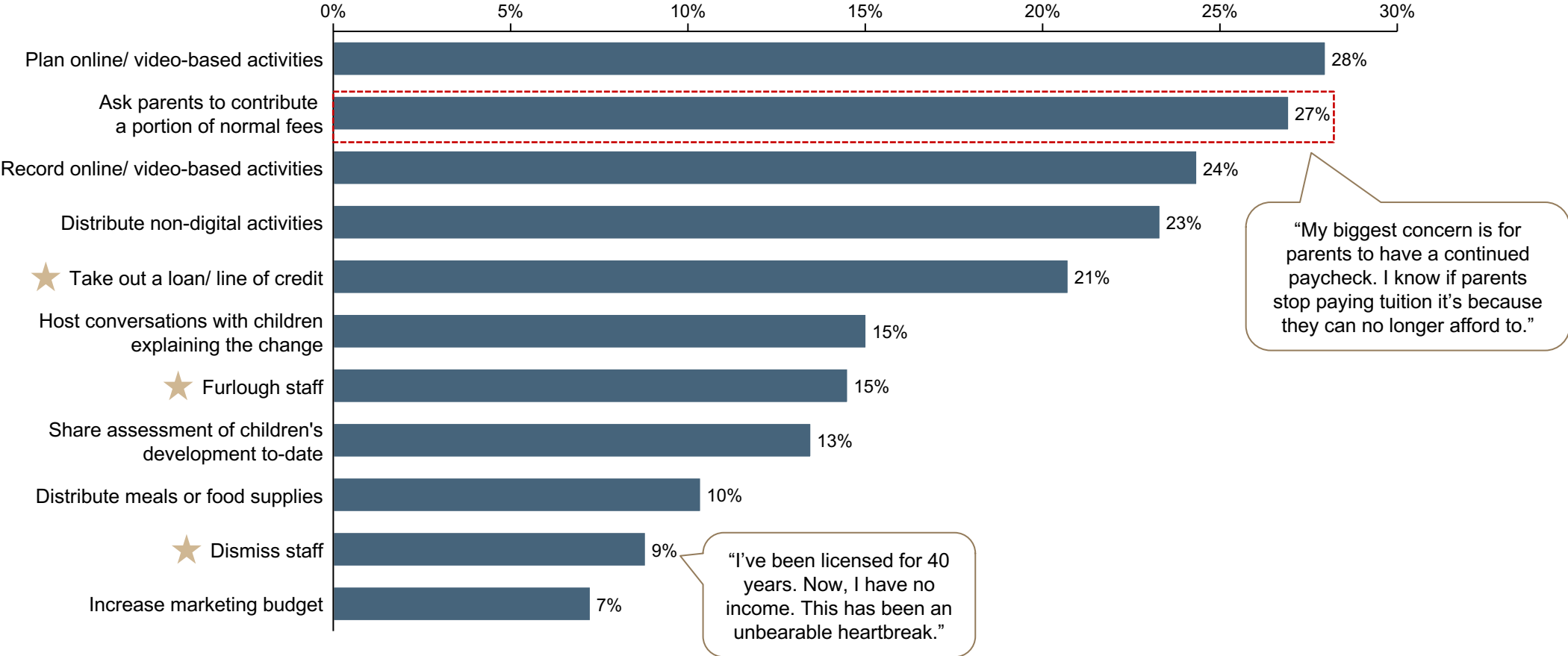
“We space the **sleeping children six feet apart**, and we spend much more time **outdoors.**”

“We are awaiting the **governor and our state to set standards of practice.**”

Note: Data reflects respondents who have responsibility or visibility into business functions of their centers; Questions: “Has your center modified its services in any way? Please select all that apply;” n=119
 Sources: Tyton Partners COVID-19 Early Childhood Educator Survey April 2020

More than 25% of centers are asking parents to contribute a portion of normal fees if they are able; in exchange, centers are putting together remote activities for kids

Business tactics undertaken by early childhood centers in response to COVID-19

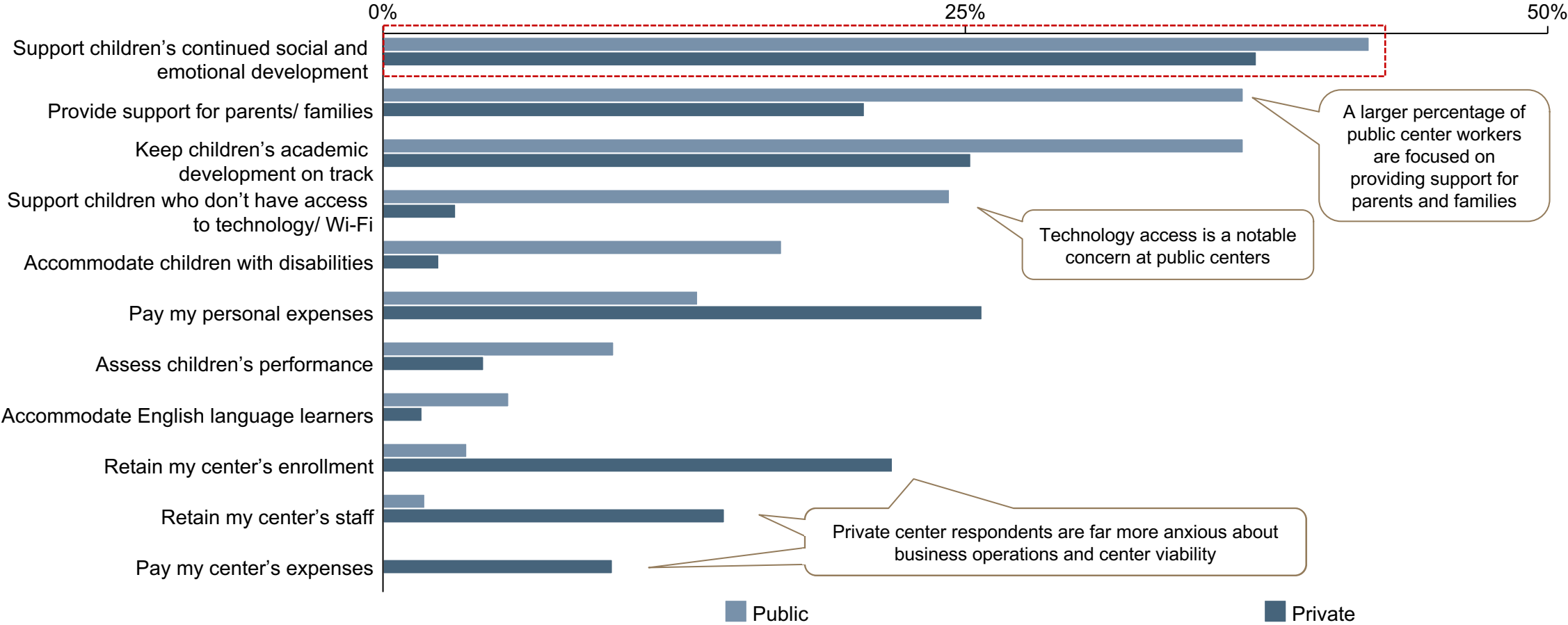


★ Identified as a top anticipated activity in the next 3-6 months

Note: Questions: "In response to COVID-19, which of the following activities has your center already pursued? Which does your center anticipate pursuing in the next 3-6 months?;" n=193
 Sources: Tyton Partners COVID-19 Early Childhood Educator Survey April 2020

Children’s social and emotional development is a key priority across public and private segments; however, segments otherwise have different short-term concerns

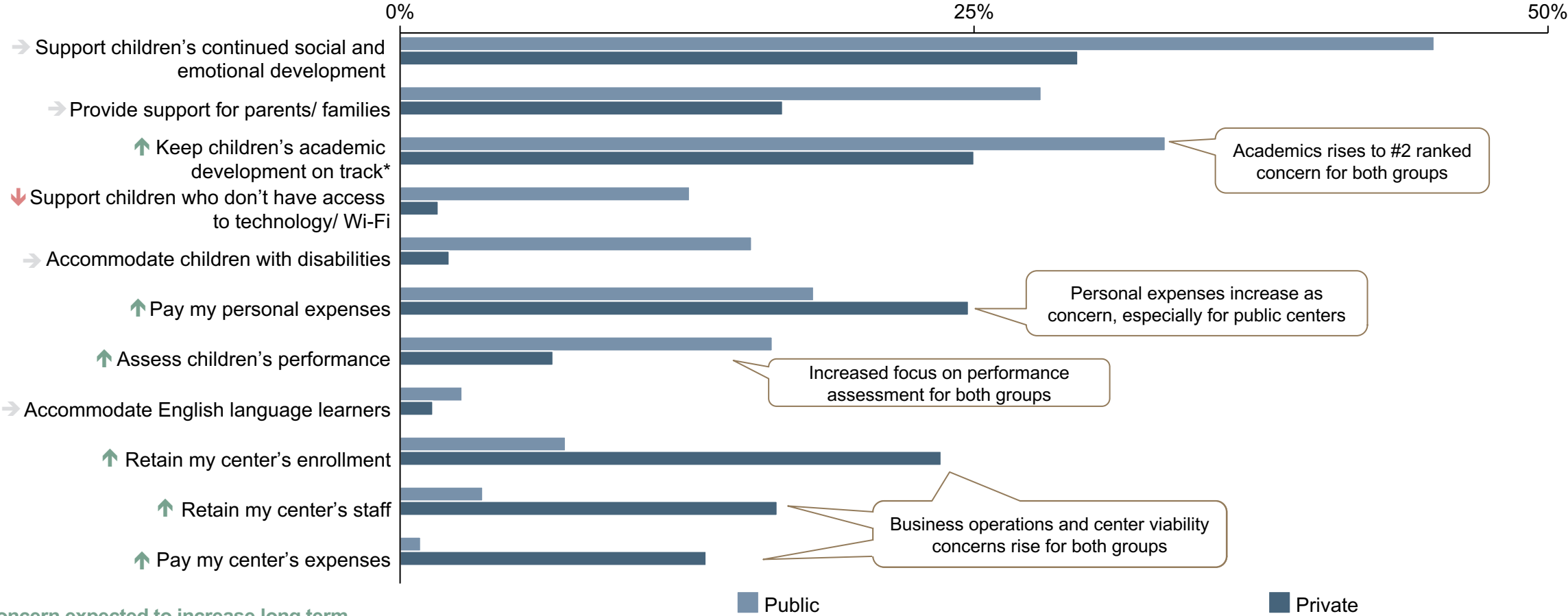
Short-term (i.e., next 2-3 months) concerns for ECE respondents



Note: Questions: “What are your key short term concerns (i.e. next 2-3 months)? Please select up to three.”; Public n = 111, Private n = 416
 Sources: Tyton Partners COVID-19 Early Childhood Educator Survey April 2020

Long term, academic development and assessment are increased focus across the public and private segments; financial concerns also come to the forefront

Long-term (i.e., 6-12+ months) concerns for ECE respondents

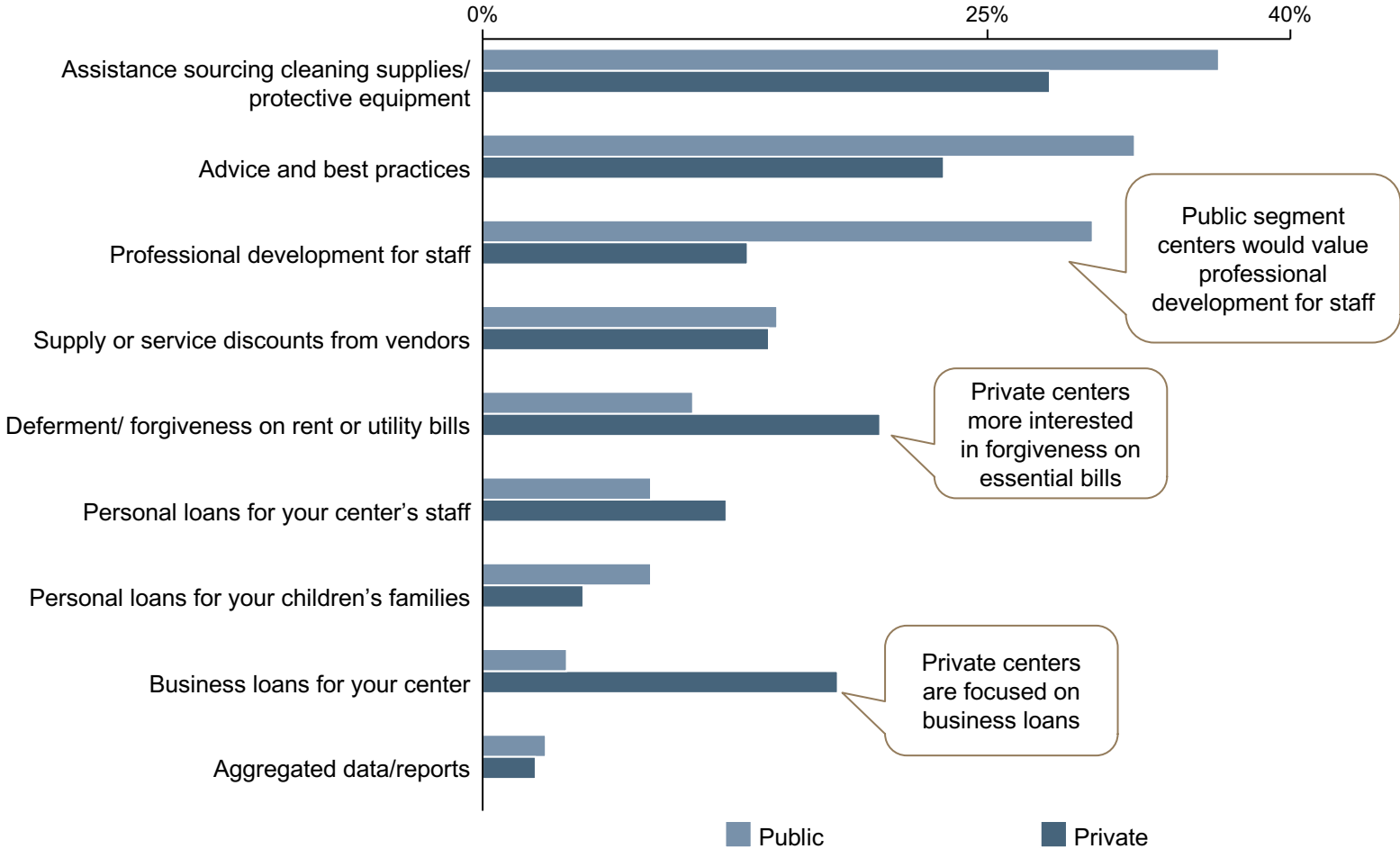


↑ Concern expected to increase long term
 → Concern remains consistent long term
 ↓ Concern expected to decrease long term

Notes: Questions: "What are your key long term concerns (i.e. 6-12 months+)? Please select up to three."; Public n = 111, Private n= 420; *Flat % reported as "top three," but increased rank
 Sources: Tyton Partners COVID-19 Early Childhood Educator Survey April 2020

Public segment centers need cleaning supplies, advice, and staff PD; private segment centers place priority on funding/ financing assistance

Most helpful potential supports



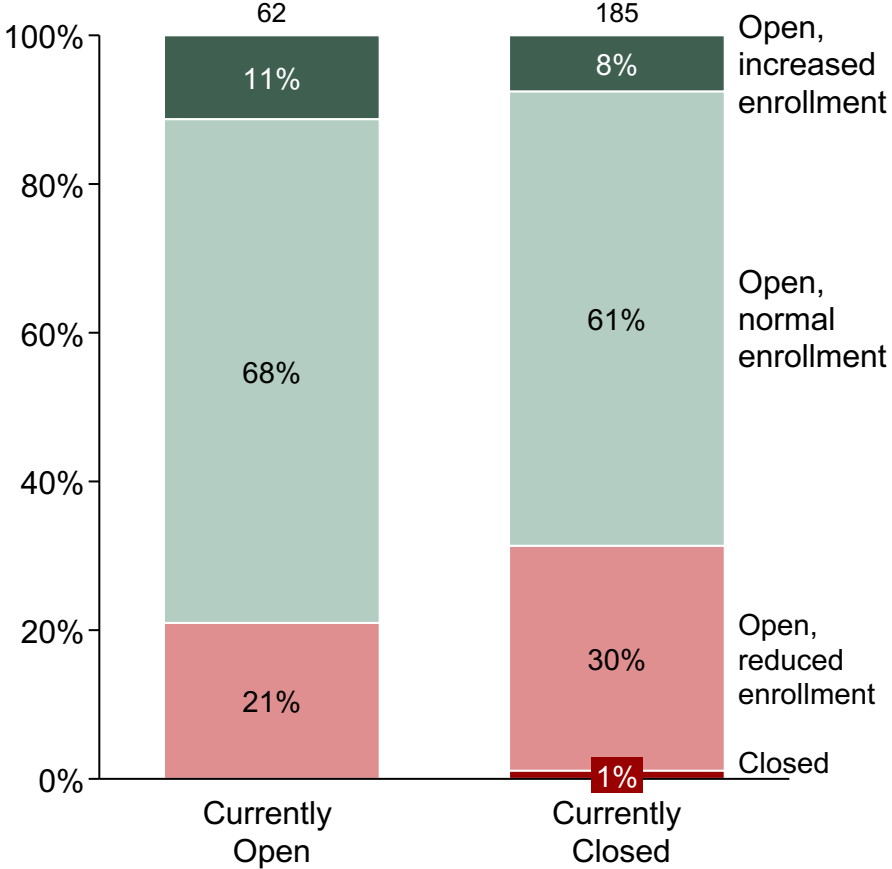
Popular write-in options

- Hazard pay for all workers at open facilities**
“My staff has been loyal and working tirelessly. Would love to see increased pay for them.”
- Direct financial grants for both open and closed centers**
“More non-loan money for small businesses. Not sure how long our center will be able to meet payroll.”
- Permission to use consumer-facing video software**
“I miss my classroom and my kids.”
- Social recognition for workers**
“I love my job, but I get frustrated because I feel we aren't given enough credit or acknowledgement.”

Note: Questions: “Which of the following support would be most helpful to support your center? Please select up to three.”; Public n = 96, Private n = 311
 Sources: Tyton Partners COVID-19 Early Childhood Educator Survey April 2020

Overall, respondents are optimistic that their centers will be open within a year, even those at currently closed centers

What do you anticipate the state of your center will be a year from now?



“We need answers [as] to when we can have the children back in the classroom.”

“Harried **parents are lost right now** due to their own overwhelming responsibilities.”

“**We are essential workers!**”

“We are closed due to our county’s shelter in place order. Families tell us that when that is lifted, they will begin **returning to their normal schedules.**”

“Seeing the Director engaging the families is indeed **comforting to me.** This shows a vested interest in her efforts of possibly reopening our school!”

“The childcare industry workforce operates on **such tight margins already,** loans may help in the short term but will only delay the big problems long term.”

“We **rely on community events** for marketing...If I can’t increase enrollment to more than our returning students, we may not be able to even reopen!”

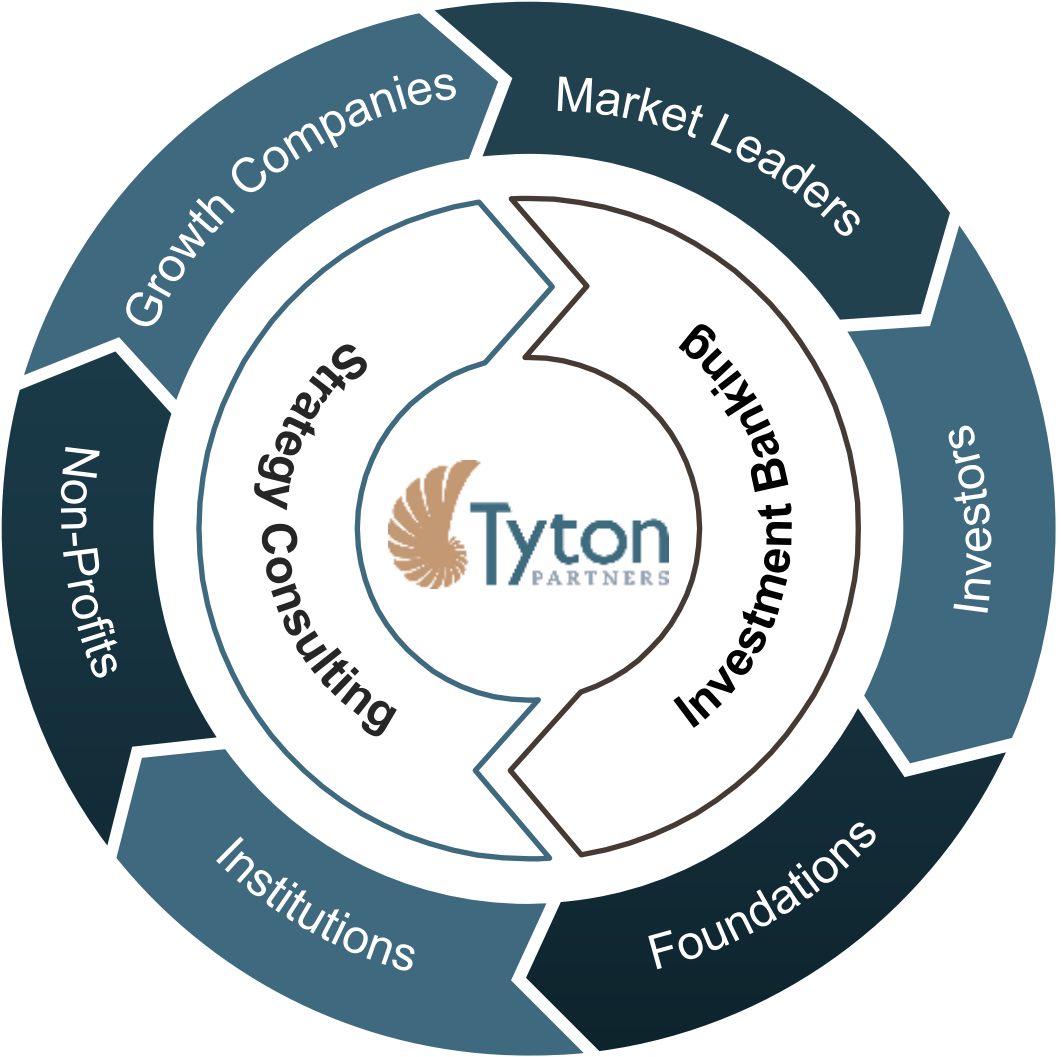
“Things are uncertain. We already had **declining enrollment prior** to the pandemic.”

Note: Questions: “What do you anticipate the state of your center will be a year from now?”; n = 247
Sources: Tyton Partners COVID-19 Early Childhood Educator Survey April 2020

Tyton Partners – Who we are

	Evolved Advisory	An evolved advisory platform serving clients across the global education, media and information markets
	Investment Banking	Investment banking services built on a foundation of strategy development and operating experience
	Strategy Consulting	Strategy consulting built on a foundation of transactional experience and data-based market insight
	Unique Insights	A dynamic firm delivering insights, connectivity, and outcomes to a diverse range of companies, institutions, organizations, and investors

Our clients span the education ecosystem



Thank You

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